

Getting to know MRPEasy



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First steps, a quick overview

First, explore all the sections, make sure to have demo data in the system.

MRPEasy has 6 primary sections:

- Dashboard – quick overview of important indicators
- CRM – sales and order management
- My production plan – production reporting
- Production planning – production management
- Stock – inventory management
- Procurement – purchasing

Plus, additional sections:

- Settings – software settings
- Demo data and videos – demo videos, data, and options to empty the database
- Free use – options to extend the free trial period
- Customization – information regarding software customization
- Help Centre – link to help resources like FAQ and User Manual

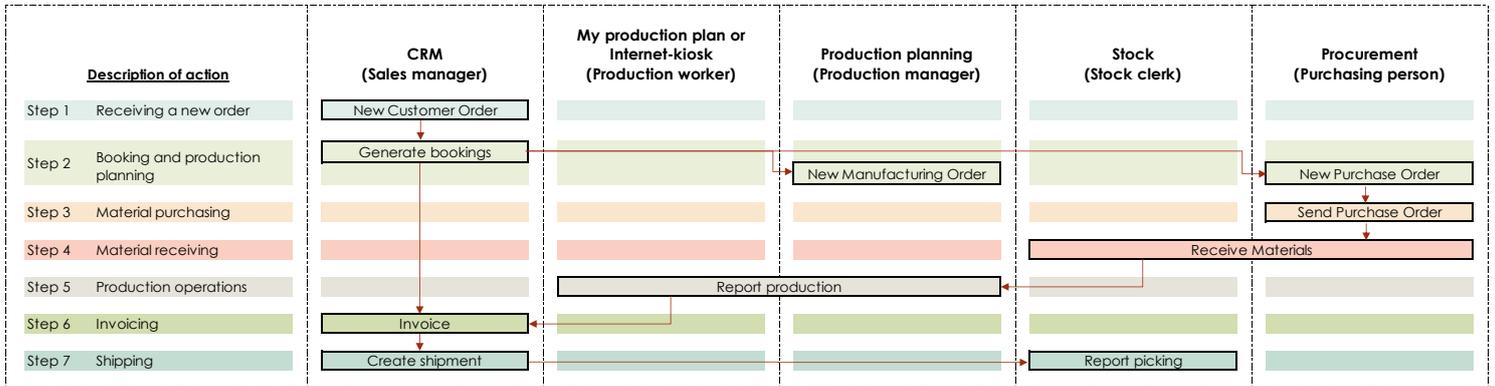
On top right, click on “Quick help” to show the description of the page you are on.

For navigation, click on section icons on the top menu bar, or use “Back” buttons to move to the previous page.

Once you’ve explored the sections, start following the tutorials below, which demonstrate many main workflows in the system.

1st tutorial - recording an order and following its completion using automatic production planning

This is one of the most important tutorials to follow, if this is your first experience with MRPEasy. You will see normal day-to-day actions - how to record an order, process it, purchase, build, invoice, and ship, please follow this simple tutorial.



This tutorial demonstrates how different departments in the company work together, you will take the role of different people, each of whom normally have limited access to only specific sections. This tutorial also lightly touches on how automatic production and material planning works. In the next tutorial we will also demonstrate how assisted planning works.

Before getting started, go to section “Demo data and videos”, and choose to delete all transactions from the system with button “Delete all orders and stock”. If it’s your first time with MRPEasy, it’s easier to follow the logic of the system this way. It will look like it’s the morning of the first day of business, everything is nice and clean – no previous orders, no inventory, but everything is set up and ready for action.

Tutorial steps:

1. Create a new confirmed Customer Order.
 - a. Go to CRM section, and click on ‘+’ to add a new customer’s order.
 - b. Choose the customer name from the dropdown menu.
 - c. Change order status to “Confirmed”.
 - d. In the Products section, enter item “Table” has been ordered. Put in any quantity you wish.
 - e. Save.

Now you have recorded a Customer Order, which is confirmed, and should go into planning.

2. Create bookings automatically.
 - a. In the Customer Order (a CO) details click on “Check stock and book items”.
 - b. Choose “Generate manufacturing orders for missing products”.
 - c. Choose “Generate purchase orders for missing raw materials”.
 - d. Click on “To book items” and confirm.

You will be taken back to the Customer Order page, on top of the Products table you will see a notification “All items have been booked”. The software has automatically

scheduled a Manufacturing Order for the ordered products and booked (i.e. reserved) these items for this CO, and Purchase Orders for the materials for production have been created.

3. Send the Purchase Orders.
 - a. Navigate to “Procurement” section.
 - b. Open one of the Purchase Orders (a PO).
 - c. Click “Send PO” on the top right, which will open your e-mail client with a prefilled e-mail and a link to the Purchase Order PDF. This action will also record the “Ordered date” of the PO and mark its status as “Ordered”.
 - d. Alternatively, if you do not use “Send PO” button you can download the PDF. But make sure to enter the “Ordered date”.

Bonus, if you receive a shipping confirmation, you can also record the shipping date on the PO, and its status will change to “Shipped”.

4. Receive the materials.
 - a. Navigate to “Procurement” section.
 - b. Open a PO.
 - c. Enter Arrival date (on the bottom part of the page)
 - d. Save

Now the materials have been accepted into stock, and we’re ready to start production.

5. Report production.
 - a. Navigate to “Production planning” section.
 - b. Open the Manufacturing Order (a MO).
 - c. Scroll to the bottom part of the page, and click “Finish as planned”.

Alternatively, you can navigate to “My production plan” section, use the calendar or list view to see the operations, click on them to see details and report production (with start-stop buttons in the Operations section). When last operation is done, click “Finish production”. This is one way of how a worker sees tasks and reports production.

You can also report material consumption as you progress (explore the different ‘shopping cart’ buttons!), or after clicking the “Finish production” button, the software will ask, if you want mark booked materials consumed or released.

Now, the production is finished, and you can ship the products.

6. Invoice the customer.
 - a. Navigate to the CRM section, and open the Customer Order details. (Note, that the customer order’s status has been updated to “Ready for shipment”. Sales pipeline view of orders visualizes this very effectively!)
 - b. Scroll to the Invoices section in the CO, click ‘+’ to add new.
 - c. Change type to “Invoice”.
 - d. Change status to “Unpaid”.
 - e. Save.
 - f. Click “Send e-mail”, or simply download the PDF.
 - g. Click “Back” to go back to Customer Order details.

You can invoice the customer any time and in parts. In addition, you can update a quotation to an invoice, and record payments.

7. Ship the products.
 - a. In the Customer Order details scroll to Shipments section, click '+' to add new.
 - b. The details are prefilled, click to save.
 - c. Click "Pick all items" (on right hand side) and confirm.

The shipment, when created initially, is a plan for shipment, you can print out required documents from here. Once items are shipped, the picking is reported - usually, this is done via the Stock section by the stock clerk.

As a reminder, how to automatically place Manufacturing Orders and Purchase Orders:

| Action | Details | Result |
|--|--|---|
| Step 1 Open Customer Order | Open a Customer Order in the CRM | |
| Step 2 Book materials/products Have the software automatically plan production operations, and material purchases, if necessary. | 1. Click "Check stock and book items" 2. Check boxes for automatic MO and PO creation 3. Click "To book items" | Products are booked for this order from stock. New Manufacturing Order(s) automatically created, if needed. New Purchase Order(s) automatically created, if needed. This is done by the salesperson, or production manager (once the order status is set to "Confirmed") |

2nd tutorial - recording an order and following its completion using assisted production and materials planning

This is an advanced tutorial, very important to follow whether you're new, or already experienced. It shows how MRPEasy assists production planner and purchaser in their operations. In many organizations, this is the standard way of using MRPEasy.

To easily follow this tutorial, make sure that you are using the standard demo data set, which can be uploaded in section "Demo data and videos". Also, make sure to delete all orders and stock for better following.

Prerequisite: the min. stock quantity for all items must be set!

Tutorial steps:

- o. Set minimum stock value.
 - a. Navigate to "Stock - Items" section.
 - b. Mark all items for editing (on the right-hand side), click on paint roller icon to bulk edit.
 - c. In the topmost "Min. stock" field enter value '0' (zero). You will see this update all items min. stock value.
 - d. Save

This is a prerequisite for the next steps to work.

1. Create a new Customer Order.
 - a. Choose the customer name
 - b. Change status to "Confirmed"
 - c. Enter ordered product "Wooden table", and a quantity ordered.
2. Create negative inventory by booking items.
 - a. In the same CO, click "Check stock and book items".
 - b. Click "To book items" and confirm.

Since not enough products were available, a negative inventory quantity has been created. Now the production planner can use this information for planning.

3. Open report "Critical on-hand".
 - a. Open report "Critical on-hand" from the "Stock" section, or from the "Dashboard" by clicking on the Min Stock indicator.

This report shows which items need to be produced, and which materials need to be purchased.

4. Create Manufacturing Orders from the report.
 - a. At the end of the "Wooden table" article line, there is a button to create a Manufacturing Order.
 - b. This will take you to MO planning screen, and prefill it.
 - c. Save.

You might have noticed that the Bill of Materials line was red in the MO planning screen. This was because there were not enough materials in stock. In the saved MO

details, you will also see that materials are shown in red, this means that no materials have been booked for this MO. You might also notice, that the planned start date of production is in the future - this is based on the lead time of materials.

5. Create Purchase Orders.
 - a. Navigate to “Critical on-hand” report in “Procurement” section.
 - b. Create Purchase Orders for the materials by clicking on the “Create purchase order” button on the material line.
 - c. Send PO by clicking “Send PO” button in the PO. Or record “Order date” manually.

6. Receive materials.
 - a. Open the PO, and enter “Arrival date” (in the bottom part of the PO)
 - b. Save

The materials have arrived for production, manufacturing can now start.

7. Report production.
 - a. Report production in section “My production plan” where you will see operations assigned to you. This will take you to operation details, you can report progress using the start-stop buttons in the Operations section. Once finished, click “Finish production” on top of the MO reporting page.
You can report material consumption as you progress (explore the different ‘shopping cart’ buttons!), or after clicking the “Finish production” button, the software will ask you, if you want mark booked materials consumed or released.
 - b. Alternatively, report production by opening the MO from section “Production planning” and in the bottom part of the MO clicking button “Finish as planned”.

The production has finished, the materials are in stock, ready for shipping.

8. Invoice the customer.
 - a. Navigate to the CRM section, and open the Customer Order details. (Note, that the customer order’s status has been updated to “Ready for shipment”. Sales pipeline view of orders visualizes this very effectively!)
 - b. Scroll to the Invoices section in the CO, click ‘+’ to add new.
 - c. Change type to “Invoice”.
 - d. Change status to “Unpaid”.
 - e. Save.
 - f. Click “Send e-mail”, or simply download the PDF.
 - g. Click “Back” to go back to Customer Order details.

You can invoice the customer any time and in parts. In addition, you can update a quotation to an invoice, and record payments.

9. Ship the products.
 - d. In the Customer Order details scroll to Shipments section, click ‘+’ to add new.
 - e. The details are prefilled, click to save.
 - f. Click “Pick all items” (on right hand side) and confirm.

The shipment, when created initially, is a plan for shipment, you can print out required documents from here. Once items are shipped, the picking is reported - usually, this is done via the Stock section by the stock clerk.

As a reminder, how to have MRPEasy assist you in production planning and purchasing, if you do not use automatic MO and PO placement:

| Action | | Details | Result |
|--------|-----------------------------------|---|--|
| Step 1 | Open Customer Order | Open a Customer Order in the CRM | |
| Step 2 | Book materials/products | <ol style="list-style-type: none"> 1. Click "Check stock and book items" 2. Click "To book items" | <p>Products are booked for this order from stock.</p> <p>If product was not in stock, negative inventory has been created. This is done by the salesperson.</p> |
| Step 3 | Planning manufacturing operations | <ol style="list-style-type: none"> 1. Open "Dashboard -> Min. stock" or "Stock -> Critical on-hand" 2. Create Manufacturing Orders | <p>Materials are booked for these Manufacturing Orders.</p> <p>If some material was not in stock, negative inventory has been created. Products from these Manufacturing Orders are automatically booked for the Customer Order(s). This is done by the production manager</p> |
| Step 4 | Purchasing | <ol style="list-style-type: none"> 1. Open "Dashboard -> Min. stock" or "Procurement -> Critical on-hand" 2. Create Purchase Orders | <p>Materials in these Purchase Orders are automatically booked for the Manufacturing Orders, which require these. This is done by the purchaser.</p> |

3rd tutorial – Production reporting by worker using My production plan

The “My production plan” is the only section the production workers need access to. All tasks that have been assigned to the worker are seen there. The worker can view the tasks in a calendar format, or in a list view.

To report production:

1. Navigate to “My production plan”.
 - a. Explore the calendar and list view – buttons to change view are on top right.’
2. Open an operation.
 - a. This will take you to the reporting screen of a Manufacturing Order.
3. Report operation start time.
 - a. In the Operations section, find your operation, and click on play button.

The start time is now recorded.

In addition, in software settings it is possible to select if worker can see other operations in the same MO, which are assigned to other workers, or not.

4. Report material consumption.
 - a. On the top right of the Materials section, click on the shopping cart icon “Consume parts for ready products” and enter the quantity of products made. This will consume materials based on the Bill of Materials of the product.
 - b. Or, on a material line click on the shopping cart icon “Consume” and enter the quantity of the material consumed.
 - c. If you need to add additional materials, click on the ‘+’ button.
 - d. Alternatively, it is possible to report materials as the final step of reporting.
5. Report end time and quantity produced
 - a. On the same operation line, click on stop button to record end time.
 - b. Enter the quantity produced.
6. Finalize the MO, if the last operation is done.
 - a. Click on “Finish production”.
 - b. If some booked materials have not been marked consumed, choose to consume or release these.

4th tutorial – Production reporting by worker using Internet-kiosk

The “Internet-kiosk” is a simplified reporting screen designed for use on a smartphone, or a tablet. This can be accessed via a browser, or the MRPEasy app.

Prerequisite: A user for a worker needs to be added with internet-kiosk access. The first user of the account (i.e. the administrator) cannot be used for internet-kiosk.

Tutorial steps:

- o. Create a user with access to internet-kiosk.
 - a. Navigate to “Settings – Human resources”
 - b. Click ‘+’ to add a new user.
 - c. Fill user details.
 - d. Give Update access only to “Internet-kiosk mode”
1. Create a Manufacturing Order.
 - a. Navigate to “Production planning” section.
 - b. Click ‘+’ to add a new MO.
 - c. Choose to manufacture one “Wooden table”
 - d. On the Bill of materials line, click Edit (button with pencil icon).
 - e. In the Operations section, assign operations to the previously created user.
 - f. Click Back and save the MO.

If an MO is already saved, then you can reassign workers in the Operations section. Likely you noticed, that the Bill of Materials line was red, when we were creating the Manufacturing Order – this is because materials were not available, and should be purchased.

2. Log in with the internet-kiosk user
3. Report production
 - a. To start an operation, click the Start button.
 - b. To pause or end, click the Pause or End button.
 - c. Report quantity made.